



DOI FBMS Standard Operating Procedure (SOP)

Department of the Interior

SOP:AA-XX / Title

Standard Operating Procedure

Title: =

Description: Creating a CPO Position and Assigning Relationships to the Position

<i>SOP Number</i>	SOP:AA-XX (where AA is abbreviation to mapping of main heading of outline for SOPs and XX is the number within the SOP)
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<i>Last Update Date</i>	
<i>Last Updated By</i>	



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1.0 Purpose of SOP

1.1 Intended Audience

All bureaus

1.2 Collaboration Team

Identify who collaborated on the development of the SOP and organization

<i>Name</i>	<i>Organization</i>
Rhonda Watkins	FBMS
Ronald Hatter	FBMS
Jennifer Schroeder	FBMS

1.3 Review Team

Identify who reviewed the SOP, Role, and Approved Date

<i>Name</i>	<i>Role</i>	<i>Approved Date</i>
Rhonda Watkins	FBMS PMO Property Team	
Rayleen Cruz	FBMS PMO Property Team	
Bill Bricker	FBMS PMO Property Team	
Ronald Hatter	FBMS	

1.4 Definition of Terms

Include definition of terms if appropriate

<i>Terminology</i>	<i>Description</i>
BLM	Bureau of Land Management
OSM	Office of Surface Mining
MMS	Minerals Management Service

1.5 Assumptions, Dependencies, and Constraints

N/A

1.6 Change / Version Control

Change and version control will be updated by both O&M and Deployment teams. CR's (both PSL and DSL) that impact the SOP should be captured as well.



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<i>No</i>	<i>Date</i>	<i>Object</i>	<i>Description of change</i>	<i>Name</i>
.				

2.0 Standard Operating Procedure

2.1 *Process Description*

There are times when a new position must be created for a CPO, APO, Project Manager or Fleet Manager. The position must be created within the FBMS Mini Master system. In addition to creating the position, the position must also have all relationships established in order for it to work properly. These relationships may include some or all of the following depending upon the position that is being created.

- A003 – Belongs to
- A008 - Holder
- A012 – Manages
- A002 – Reports to
- B007 – Described by

2.2 *When the Process is Used*

When a new CPO APO, PM or FM is required or when a CPO APO, PM or FM is leaving and new one must be assigned.

2.3 *Related Processes and other References*

- PP01 Maintain HR Object.

2.4 *Who is involved in the Process*

- Property person in charge of maintaining the HR Mini Master Record and its relationship of CE, CPO, APO, PM and FM.
- Bureau HR Mini Master Administrator

2.5 *Transactions used in the Process*

- Create New Org units and Positions

Use the following menu path(s) to begin this transaction:

- Select **PROPERTY** tab ➔ **Property Org Home** tab ➔ **Create New Org Units and Positions** folder to go to the *Create New Org Units and Positions* screen.



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3.0 Process Flow

N/A



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Create New Org units and Positions Initial Screen

Maintain object

Menu | Back | Cancel | System | Display <-> Change | Create infotype | Change infotype | Display infotype | Copy infotype | Delimit infotype | Delete infotype | More...

Find by
▼ Position
Search Term
Structure Search

Plan Version: Current plan
Object Type: Position
Object ID:
Object abbr.:

Active | Planned | Submitted | Approved | Rejected

Infotype Name	
Object	
Relationships	
Description	
Department/Staff	
Planned Compensation	
Vacancy	
Acct. Assignment Features	
Authorities/Resources	
Work Schedule	
Employee Group/Subgroup	

Time period
Period
From 03/16/2009 to 12/31/9999
☐ Today ☐ Current week
☐ All ☐ Current month
☐ From curr.date ☐ Last week
☐ To current date ☐ Last month
☐ Current Year
Select.

1. Click **Position** from the drop down menu in the **Object Type** field
2. Highlight the **Object** line item that appears under the **Infotype Name** list
3. Click **Create infotype** to create a new **Position**.



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Create Object Screen

The screenshot shows the 'Create Object' screen in the DOI FBMS system. The screen has a top navigation bar with buttons: Menu, Save, Back, Cancel, System, Previous record, Next record, Object description, and Fast entry. Below the navigation bar is a 'Find by' section with a dropdown menu set to 'Position'. Under 'Position', there are two options: 'Search Term' and 'Structure Search'. The main form area contains the following fields:

- Position: [Empty text box]
- Planning Status: Active
- Validity: 03/16/2009 to 12/31/9999
- Object description: [Empty text box]
- Object abbr.: CPO_BLM_AZ
- Object name: CPO for BLM in Arizona (highlighted with a yellow background)
- Language Key: English

A 'Change Information' button is located to the right of the Validity field.

As required, complete the following fields:

Field Name	R/O/C	Description
Validity	R	Start date of the Position.  Note: The validity begin date in the FBMS system will default to the current date which can be changed if desired. The to date defaults to 12/31/9999, which should remain as is. Example: 03/16/2009
Object abbr.	R	Short abbreviation for the Position. Example: CPO_BLM_AZ
Object name	R	Full description of the Position. Example: CPO for BLM in Arizona

- Click **Save** to save your entries
- You have created a new CPO position for BLM Arizona. Now you need to assign relationships to the position. These relationships include:



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- The Organizational Unit the CPO will belong to
- The APO the CPO will Report to
- The job the position is described by (CPO Job)
- The Person that will hold the New CPO Position
-

The next steps demonstrate how to add a newly created position to an Organizational Unit.

Essential Relationship Relationships Screen

Essential relationship Relationships

Menu | Save | Back | Cancel | System | Previous record | Next record | Object description | Fast entry | Allowed relationships

Find by
▼ Position
 Search Term
 Structure Search

Position: CPO_BLM_AZ CPO for BLM in Arizona
Planning Status: Active
Valid from: 03/16/2009 to 12/31/9999 [Change Information](#)

Relationships
Relationship type/relationship: A 003 Belongs to

Related Object
Type of related object: Organizational unit
ID of related object: 50000588
Abbreviation:
Name:
Priority: ☐

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the position we created to the Organizational Unit that it will belong to. Example: A 003 for belongs to
ID of related object	R	All Positions must be linked to an Organizational Unit – Cost Center. The Id for the Related Object in this case is an Organizational Unit that already exists. To find the correct organizational unit to link the Position to simply use the search feature or the structure search and click on the drop down menu to search for the organizational structure. Double-click on the correct organizational structure. Example: 50000250



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6. Click **Save** the **Save** button to save your entries. You have created the position and where that position relates to within the Organizational Structure. Next you must continue to develop the relationships with an APO, a person that holds this position and is described by a job title.

Maintain Object Screen

Maintain object

Menu | Back | Cancel | System | Display <-> Change | Create infotype | Change infotype | Display infotype | Copy infotype | Delimit infotype

Find by
 Position
 Search Term
 Structure Search

Plan Version: Current plan
 Object Type: Position
 Object ID: 50001475 CPO for BLM in Arizona
 Object abbr.: CPO_BLM_AZ

Active | Planned | Submitted | Approved | Rejected

Infotype Name	
Object	✓
Relationships	✓
Description	
Department/Staff	
Planned Compensation	
Vacancy	
Acct. Assignment Features	
Authorities/Resources	
Work Schedule	
Employee Group/Subgroup	

Time period
☒ Period
 From 03/16/2009 to 12/31/9999
☐ Today ☐ Current week
☐ All ☐ Current month
☐ From curr.date ☐ Last week
☐ To current date ☐ Last month
☐ Current Year
 Select.

7. Highlight the **Relationship** line item that appears under the **Infotype Name** list.
8. Click **Create infotype** to establish the relationships of this new position.



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The next steps demonstrate how to add a newly created position to the APO they will report to.

Create Relationships Screen

Create Relationships

Menu Save Back Cancel System Previous record Next record Object description Fast entry Allowed relationships

Find by
Position
Search Term
Structure Search

Position: CPO_BLM_AZ CPO for BLM in Arizona
Planning Status: Active
Valid from: 03/16/2009 to 12/31/9999 Change Information

Relationships
Relationship type/relationship: A 002

Related Object
Type of related object: Position
ID of related object: 50001309
Abbreviation:
Name:
Priority:
Weighting: %

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the CPO position we created to the APO that they will report to. Example: A 002 for reports to
ID of related object	R	All CPO Positions must be linked to an APO. The Id for the Related Object in this case is an APO that already exists. To find the correct APO to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the APO. Double-click on the correct APO. Example: 50001309

9. Click **Save** to save your entries.



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Maintain Object Screen

Maintain object

Menu Back Cancel System Display <-> Change Create infotype Change infotype Display infotype Copy infotype Delimit infotype Delete info

Find by
Position
Search Term
Structure Search

Plan Version Current plan
Object Type Position
Object ID 50001475 CPO for BLM in Arizona
Object abbr. CPO_BLM_AZ

Active Planned Submitted Approved Rejected

Infotype Name	
Object	✓
Relationships	✓
Description	
Department/Staff	
Planned Compensation	
Vacancy	
Acct. Assignment Features	
Authorities/Resources	
Work Schedule	
Employee Group/Subgroup	

Time period
Period
From 03/16/2009 to 12/31/9999
Today Current week
All Current month
From curr.date Last week
To current date Last month
Current Year
Select

- Highlight the **Relationship** line item that appears under the **Infotype Name** list
- Click **Create infotype** to establish the relationships of this new position.



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The next steps demonstrate how to add a newly created position to the CPO job they are described by.

Create Relationships Screen

Create Relationships

Menu | Save | Back | Cancel | System | Previous record | Next record | Object description | Fast entry | Allowed relationships

Find by
Position
Search Term
Structure Search

Position: CPO_BLM_AZ CPO for BLM in Arizona
Planning Status: Active
Valid from: 03/16/2009 to 12/31/9999 [Change Information](#)

Relationships
Relationship type/relationship: B 007

Related Object
Type of related object: Job
ID of related object: 50000256
Abbreviation:
Name:
Priority:
Weighting: %

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the CPO position to the CPO job that it is described by Example: B 007 for Described by



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Field Name	R/O/C	Description
ID of related object	R	<p>All Positions must be linked to a Job. The Id for the Related Object in this case is a CPO job that already exists.</p> <p>To find the correct CPO job to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the CPO job. Double-click on the correct CPO job.</p> <p>Example: CPO Job50000052</p> <p>The following are additional jobs that can be assigned to:</p> <p>APO Job - 50000051</p> <p>CE Job - 50000050</p> <p>FM Job – 50000053</p> <p>PM Job - 50000054</p>

12. Click **Save** to save your entries.

Maintain Object Screen

Maintain object

Menu Back Cancel System Display <-> Change Create infotype Change infotype Display infotype Copy infotype Delimit infotype Delete info

Find by
Position
Search Term
Structure Search

Plan Version Current plan
Object Type Position
Object ID 50001475 CPO for BLM in Arizona
Object abbr. CPO_BLM_AZ

Active Planned Submitted Approved Rejected

Infotype Name
Object
Relationships
Description
Department/Staff
Planned Compensation
Vacancy
Acct. Assignment Features
Authorities/Resources
Work Schedule
Employee Group/Subgroup

Time period
Period
From 03/16/2009 to 12/31/9999
Today Current week
All Current month
From curr.date Last week
To current date Last month
Current Year
Select



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13. Highlight the **Relationship** line item that appears under the **Infotype Name** list
14. Click [Create infotype](#) to establish the relationships of this new position.



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The next steps demonstrate how to add a newly created position to the person that will hold the position.

Create Relationships Screen

Menu Save Back Cancel System Previous record Next record Object description Fast entry Allowed relationships

Find by
Position
Search Term
Structure Search

Position: CPO_BLM_AZ CPO for BLM in Arizona
Planning Status: Active
Valid from: 03/16/2009 to 12/31/9999 Change Information

Relationships
Relationship type/relationship: A 008

Related Object
Type of related object: Person
ID of related object: 40001234
Abbreviation:
Name:
Priority:
Weighting: %

As required, complete/review the following fields:

Field Name	R/O/C	Description
RelationshipType/Relationship	R	Identifies the type of relationship you are establishing. In this example we are linking the CPO position to the person that will hold the job. Example: A 008 for Holder
ID of related object	R	The Id for the Related Object in this case is a Person that already exists in the system. To find the correct person to link the Position to simply use the search feature or structure search and click on the drop down menu to search for the employee number. Double-click on the correct employee number Remember, in most cases this will be a DOI employee number Example: DOI Employee Number 40001234

- Click **Save** to save your entries.
- You have successfully created a new CPO position and established its relations with the Organization Unit, Job, APO and person assigned to the new CPO position.



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You may not have to go through all these step if the position is already created or a user is a holder of the position already. If you need to reassign a CPO to an APO you would only do certain steps. Such as, changing the APO number they report to.

4.0 Troubleshooting/Common Errors

- Error message/Action/Examples – common transaction errors, BP questions

<i>Error</i>	<i>Description</i>	<i>Resolution</i>



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5.0 SOP Approval

Besides the relevant deployment and O&M team members (approvals noted in previous section), SOP's should be reviewed and approved by the BP Team lead, and the Production Support lead.

<i>Name</i>	<i>Role</i>	<i>Approved Date</i>
	FBMS PMO – Business Process Team Lead	
	FBMS PMO – Production Support Manager	